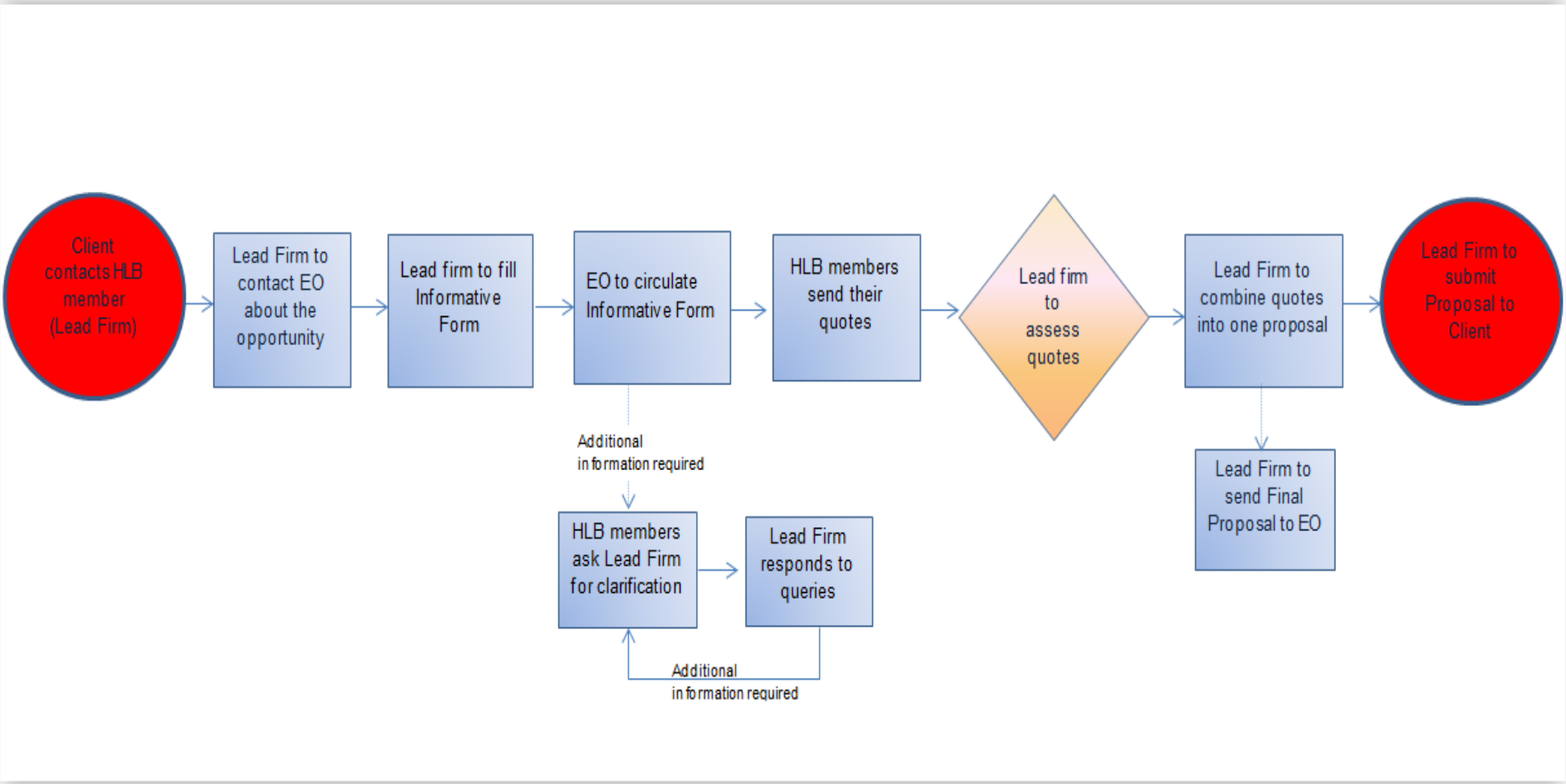


HLB International

Proposal Process

Proposal Process

Process Map



Proposal Process

Informative Phase



- Lead firm to assess the information available (*= check with the client, do further research*)
- Information received at once and in the same format. If information is missing the form will state why it is missing and when it will be available. (*= no back and forth emails to ask questions*)
- All contact details will be available
- All HLB members will have access to guidelines

If the form is not completed in its entirety or comprehensive answers are not provided the form will not be forwarded to the network.

Download Informative Form

http://hlbi.com/index.php?option=com_k2&view=itemlist&layout=category&task=category&id=270&Itemid=1573

Proposal Process

Follow up



HLB Members to provide feedback

- What went wrong?
- Which phase of the process was a constraint ?
- Why?
- How can we improve?

Download Follow Up Form

http://hlbi.com/index.php?option=com_k2&view=itemlist&layout=category&task=category&id=270&Itemid=1573

Proposal Process

Best Practice



OUTBOUND SIDE

- Inform client that they can opt either for a single point of contact / or coordinate directly with each HLB country
- Provide reasonable deadlines to other members firms
- Provide sufficient background information:
 - On the Client
 - Scope of Work
 - Clients' Expectations
 - Fees
- Provide EO with final copy of proposal
- Report onto the online system on HLB Intranet - contact Jean-Charles Mahler at jcm@hlbi.com for any issues

INBOUND SIDE

- Ensure responsiveness (at least acknowledge receipt within 24hours)
- Quote a reasonable price
- Provide feedback to referring firm
- Any information Lead Partner should be particularly aware of

Referred Work Code of Conduct

Download

http://hlbi.com/index.php?option=com_k2&view=itemlist&layout=category&task=category&id=270&Itemid=1573

Proposal Process

EO's role



HLB International Executive Office can assist in identifying and communicating with HLB Members, but it is not responsible for the content of the finished proposal, or for ensuring its completion.

It is the responsibility of the **Lead Member Firm** to oversee and take charge of the process and ensure the accuracy, timely completion and submission of any international client proposal.

Executive Office

For enquiries about international proposals, please contact:

Susanna Spada, HLB International Executive Office - Email: spa@hlbi.com

Proposal Process

EO's role



1. Initial Phase – Alert the network & Dissemination of Information – *immediate effect*

Objective – Standardize the process

- Lead Firm to provide information
- EO to identify firms and forward informative form to kick off the process

2. Follow Up Phase – *immediate effect*

Objective - Monitor status / Review History – what works, what doesn't and why?

- Lead Firm to send EO final proposal
- HLB members to provide feedback

3. Manage Communication and Documents on Intranet – *in progress*

Objective - Creation of a shared platform for member firms and EO to work on and monitor

The platform will include:

- Informative form and other communication among members
- Partners/firms required for tenders (allocated automatically)
- CVs / Firm Profiles
- Tender Documents
- Proposal ID's